

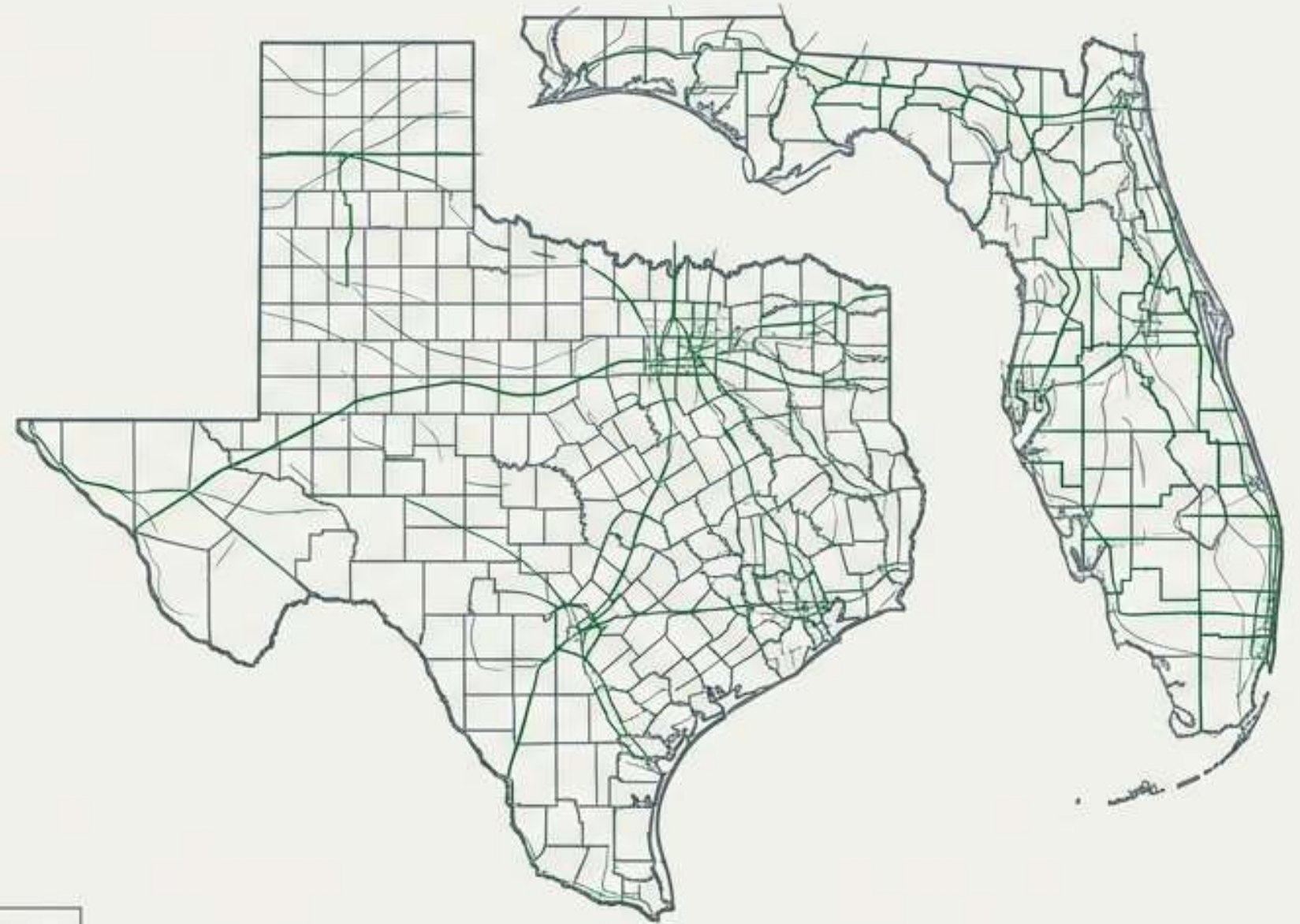
[MORTGAGE: 6.30% ▼]

[S&P 500: 7,137 ▲]

[FED: 3.50-3.75% ■■]

# Q2 2026 Market Intelligence Update: The Real Estate Dealmaker's Edge

Synthesizing macro-economics, hyper-local distress data, and telemarketing execution for Texas and Florida investors.



Compiled by Real Estate IQ (REIQ) | April 2026 Data Briefing

Macro  
Stabilization

30-yr fixed: 6.30%  
Fed hold: 3.50-3.75%  
S&P 500: 7,100+

Surging  
Inventory

TX active listings:  
~302K (+8% YoY)  
Supply:  
4.5-7+ months

The 2026 Buyer  
Leverage Window

Q1 filings: +26% YoY

TX/FL capture:  
~25% US total

Accelerated  
Distress

The post-shock market has definitively tilted. High inventory, rising seller fatigue, and stabilizing borrowing costs create unparalleled negotiation leverage for cash and creative buyers.

# Macro-Economic Weather Report

## Interest Rates



**6.30%**  
Mortgage Rates

Down from 6.8% early 2026 peak. Easing rates provide a slight affordability buffer, supporting refis and creative buyer pools.

## Fed Funds & Inflation



**3.50-3.75%**  
Fed Funds Rate

Headline inflation at 3.3% YoY. Energy up 12.5% due to US-Iran conflict disruptions, keeping the Fed cautious.

## Equities



**7,137**  
S&P 500 Peak

Relief rally driven by AI infrastructure spending and mega M&A. Avoids recessionary panics.

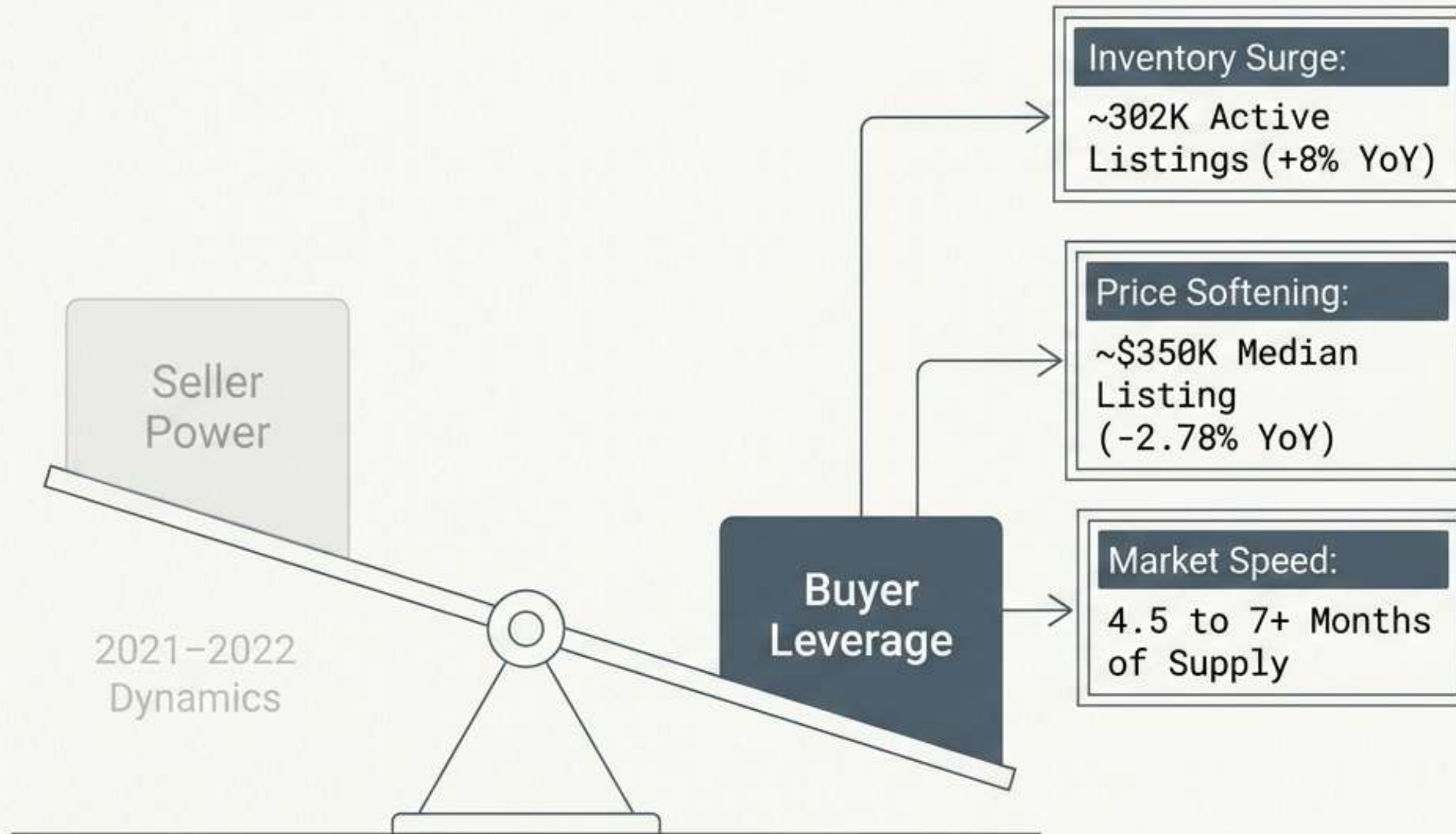
## Consumer & Housing



**4.1 Months**  
National Supply

Existing-home sales dipped 3.6% MoM to 3.98M. Market remains soft despite strong broader equities.

# Texas Real Estate Reality Check



## The Correction Window

The TRERC forecast projects a modest +1.3% price growth overall,

but metro-level softness and extended days on market (DOM) are forcing elevated price cuts,

delivering prime conditions for motivated-seller assignments.

# Metro Battlefield Matrix

Austin	San Antonio	Houston	DFW
<b>Median Price:</b> ~\$426K (-3.0% YoY)	<b>Median Price:</b> ~\$317K (Flat)	<b>Median Price:</b> ~\$330K (-1.5% YoY)	<b>Median Price:</b> ~\$365K (-1% to -3% YoY)
<b>Supply / DOM:</b> 5.5-6.5 months / 74-102+ days	<b>Supply / DOM:</b> 5.5-6.0+ months / 81-108 days	<b>Supply / DOM:</b> ~4.7 months / 70-98 days	<b>Supply / DOM:</b> 4.9-5.5 months / 66-74 days
<b>Price Cuts:</b> 47% of listings	<b>Price Cuts:</b> 28% of listings	<b>Price Cuts:</b> 22% of listings	<b>Price Cuts:</b> 23% of listings
<b>Tactical Focus:</b> <b>Deepest Correction.</b>  Prime for 90+ DOM, massive price-cut investor sales.	<b>Tactical Focus:</b> <b>#1 Buyer's Market.</b>  Highest inventory growth; entry-level off-market flips.	<b>Tactical Focus:</b> <b>High Volume.</b>  Energy-area discounts, resilient overall sales momentum (+3.7% closed).	<b>Tactical Focus:</b> <b>Balanced Growth.</b>  Builder closeouts and suburban (Collin/Frisco) assignments.

# The Wholesale Radar



Austin's deep correction (+20-25% Wholesale Opportunity) and San Antonio's supply surge (+15-18% Opportunity) create the widest negotiation spreads for 90+ DOM acquisitions.

# Yield Dynamics: End-Buyer Perspectives



## Long-Term Rentals (LTR)

Status: Cooling / Softening

Data: Austin and DFW rents down ~5.8% to 6.0% YoY. Houston median at \$1,180-\$1,480 (-5.6%).

Driver: Added multifamily supply and builder inventory growth. Concessions are common.



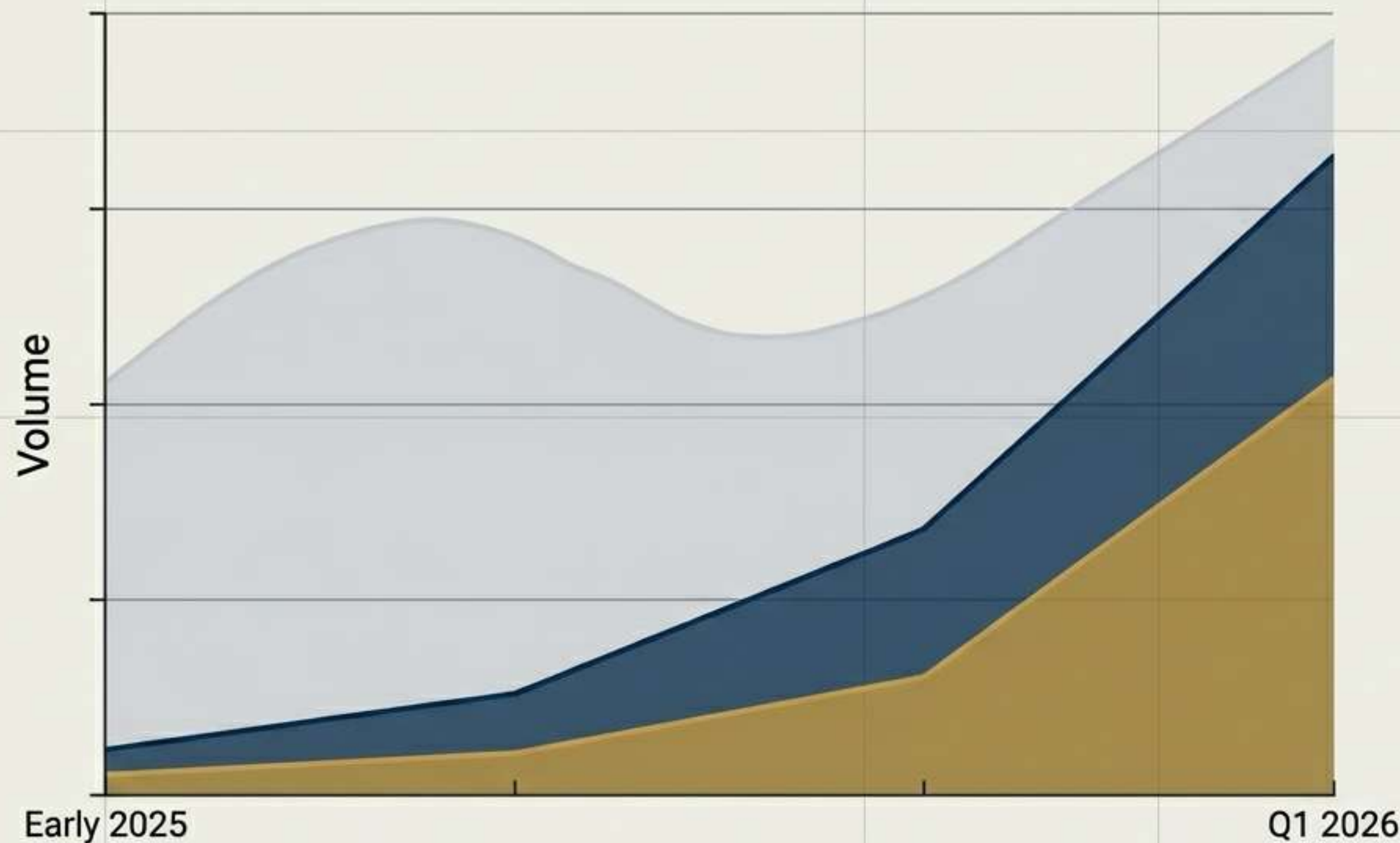
## Short-Term Rentals (STR)

Status: Resilient / Stabilizing

Data: Statewide occupancy holding at 52-60%. Austin ADR ~\$220 (Est. Rev ~\$3,890/mo). Houston ADR ~\$167 (Est. Rev ~\$2,890/mo).

Driver: Extended-stay corporate travel and upcoming major event tailwinds buffering yields against supply pressure.

# The Distressed Property Surge



## National

Q1 2026 National Filings:  
**118,727 (+26% YoY)**

Completed REOs: Up 45%  
YoY nationally.

## Texas

Texas Q1 Starts: **10,617**

(Highest volume nationally.  
Rate: 1 in 2,598 units)

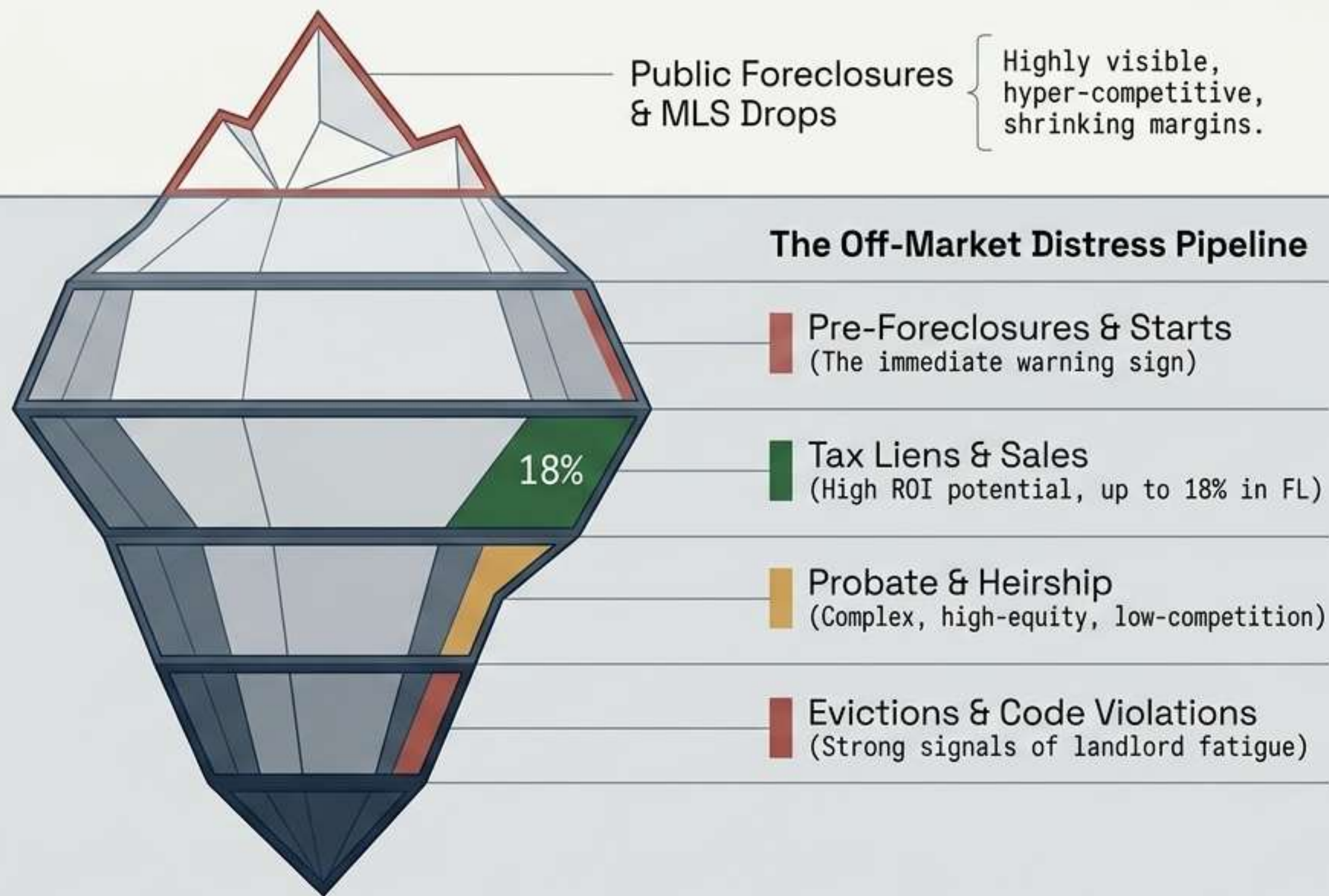
## Florida

Florida Q1 Starts: **10,099**

(Rate: 1 in 2,124 units)

Takeaway: Texas and Florida anchor ~25% of the entire national distressed volume. Financial pressures are accelerating filings, creating a massive, highly motivated seller pool.

# The “Hidden Distress” Iceberg



## Insight

Waiting for a property to hit the public auction block or MLS means missing the 10-20%+ discount window.

True deal flow requires multi-category, off-market scraping before the distress becomes public knowledge.

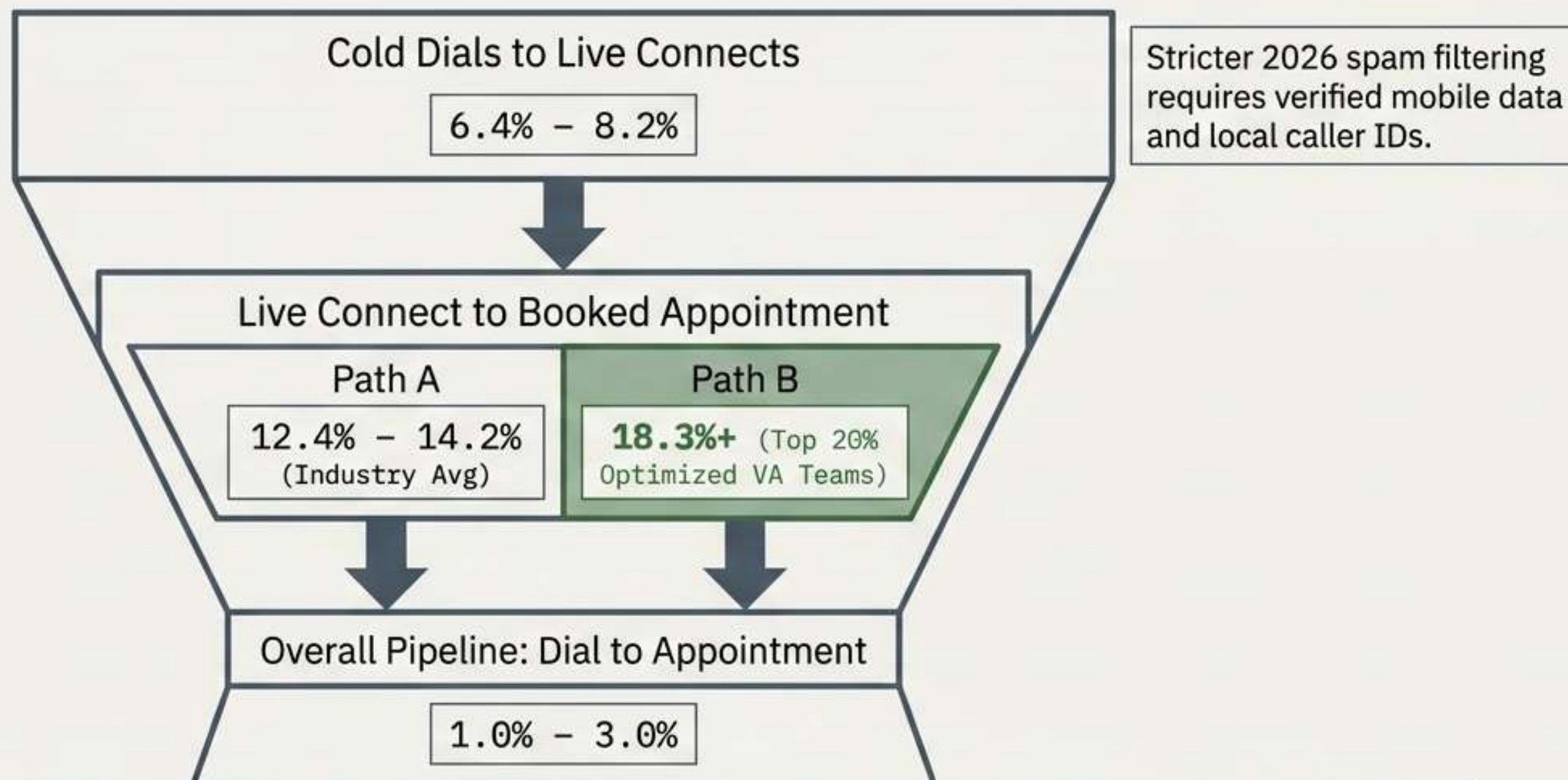
# County-Level Data Freshness Matrix

	Jan	Feb	Mar	Apr	May	Jun	Jul
Harris (TX)	310	325	340	857	324	371	18?
Dallas (TX)	305	315	330	400	270	Website Offline	Website Offline
Bexar (TX)	302	312	322	380	310	In Progress	In Progress
Miami (FL)	350	360	375	500	100	32	6
Tampa (FL)	330	340	355	450	90	25	4

## The Information Edge

County posting delays and system changes in mid-year create massive blind spots for standard investors. Automated, real-time capture bypasses public delays, delivering the freshest leads in high-volume counties exactly when the competition is locked out.

# Competitive Execution: The Telemarketing Funnel



**Target Output: A highly optimized, verified-data VA operation yields a Cost-Per-Qualified-Appointment (CPA) of \$85 - \$150.**

# Tactical Playbook by Persona



## Wholesalers

- Target 90+ DOM listings and early-stage pre-foreclosures.
- Leverage the inventory surge. Pitch national rate stabilization alongside local oversupply to secure 10-20% discounts from fatigued sellers.



## Fix & Flippers

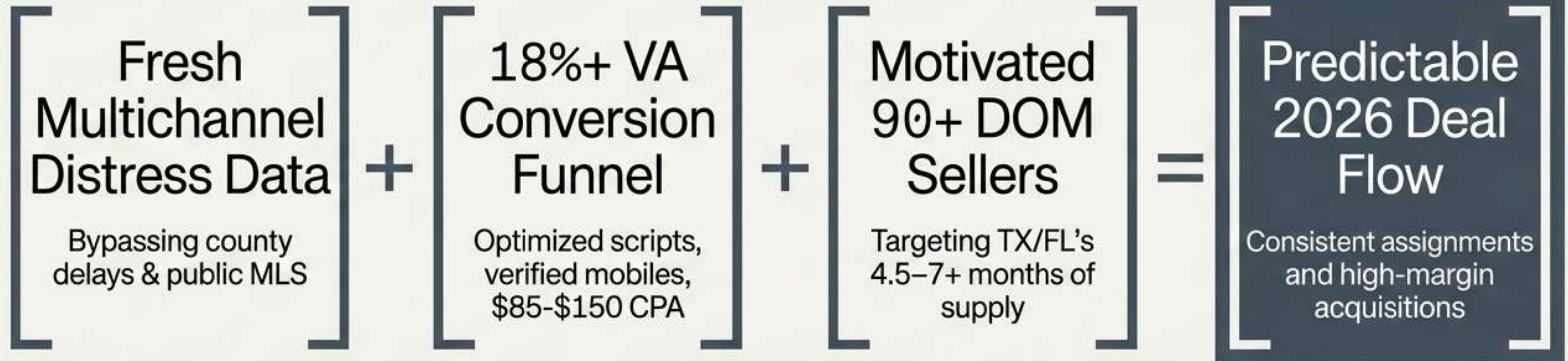
- Enforce a strict 70% ARV threshold.
- With properties sitting on the market 70-100+ days, build extended holding costs into your models.
- Target value-add properties in Houston's energy-sector suburbs or Austin's correction zones.



## Rental Investors





- **LTR Strategy:** Rents are softening (-5% YoY)—seek stabilized assets or steep acquisition discounts.
- **STR Strategy:** Target event-hub markets (Austin, San Antonio River Walk) to capture 55%+ occupancy and corporate revenues.

# The Dealmaker's Synthesis



The golden days of easy MLS flips are over. In 2026, success requires treating real estate acquisition like a precision data operation.

# Immediate Action Directives

-  Scan Austin/San Antonio MLS for 90+ DOM & price-cut listings.
-  Audit active deals against the strict 70% ARV rule.
-  Build hyper-local cash buyer lists targeting job-growth suburbs (e.g., Plano, Katy).
-  Upgrade from generic lead lists to multi-category distressed data tracking.

# Secure Your Q2 Pipeline

Stop waiting on delayed county records. Join the REIQ Q2 Cohort for live deal reviews, off-market data access, and VA telemarketing implementation.



Scan to access free coaching & sample distressed data reports.